



Wisconsin Outdoor Recreation Participation Trends and Observations

WHILE RECREATION PARTICIPATION TRENDS MAY BE USEFUL IN ANTICIPATING FUTURE RECREATION PROGRAMMING OR FACILITY NEEDS, THE USE OF THESE TRENDS MUST BE TEMPERED BY AN UNDERSTANDING OF THE PRIORITIES AND POLICIES (SUCH AS FITNESS OF EQUITY GOALS) OF PARK AND RECREATION SERVICE PROVIDERS. THIS CHAPTER FOCUSES ON SEVEN KEY INDICATORS THAT ALERT DECISION-MAKERS TO SHIFTS IN RECREATION PARTICIPATION AND DEMAND. UNDERSTANDING THESE INDICATORS WILL AID RECREATION PROVIDERS IN EVALUATING THE IMPACTS A GIVEN TREND WILL HAVE ON THE DIVERSE ELEMENTS OF PARKS AND OPEN SPACE.



Key Indicators and General Trends

The seven indicator areas relevant to the task of evaluating future recreation demands are:

- DEMOGRAPHICS
- HEALTH AND WELLNESS
- ENVIRONMENT
- TECHNOLOGY
- ECONOMICS
- GOVERNMENT
- CHANGING LAND USE

These indicators are discussed below in sequence.

Demographics

One of the most important indicators of future recreational demand and interest is the forecast for demographic change. Presently, the aging of the baby boom generation is one of the most significant trends affecting outdoor recreation. During the years 1946–1964, millions of infants were born. After 1964, birth rates fell abruptly and did not rise again until after 1980 when the baby boomers became parents themselves. Because of improved health, fitness, and lifestyle changes, many members of the boomer generation are participating in recreational activities at ages well past those in previous generations. Boomers are also retiring with relatively high disposable incomes, allowing them to travel and participate in a diverse range of recreational activities. As this population continues to age, the



demand for less active outdoor recreation pursuits and facilities—walking, gardening, and birding, for example—has become an increasingly important factor in state recreation demand. As more members of this demographic retire, one would expect a higher level of marginally fit recreation users, and more demand for mid-week recreation programs.

While the baby boom generation is important in predicting future recreation demand, Generation Y is also becoming an important group to watch. Members of this generation, born between 1981 and 1995, make up the largest consumer and recreation group in the nation. As Generation Y begins to enter the workforce and have families of their own, their specific demands will increasingly shape recreation supply and demand. Although we will not know the true profile of this generation for another 10–15 years, every indication suggests that their values and desires are very different from

those of their parents' generation. Tendencies within this group include a demand for instant access to information, high levels of multitasking, and low rates of physical activity. These characteristics will provide challenges to recreation planners and providers in the future.

Other segments of the population have also been shifting. Recent census data shows a rapid change in racial and ethnic diversity and population growth in immigrant communities within the state. Immigrant populations are typically family-oriented and have children, but their recreational interests and needs are different than those provided in traditional park and recreation programs. For example, in areas with larger Hispanic populations, parks and recreational areas have experienced an increased demand for picnic areas to accommodate large family gatherings. As immigrant communities continue to grow, future park and recreation needs are expected to change in response to this population's demands.



While age structures and immigrant populations have changed in recent years, a variety of new and non-traditional family structures have also emerged. These new family types have created many new and different leisure patterns and recreation demands. More adults now remain single until their 30s and 40s, with many of those that do marry either postponing having children until later in their lives, or choosing to not have children at all. At the same time, single-parent families have also increased. For all of these groups, free time is perceived as an opportunity to spend time with family and friends and as such, they often seek out recreation activities that allow group participation.

While group activities are popular among single-parent and no-children families, members of these demographics are often also interested in the more active and unusual recreation available in experiential trips and other non-traditional recreation activities. Traditional team sports such as football have reached a plateau in their growth, while more modern activities such as geocaching and disc golf continue to rise in popularity.

Recreation demand has also been affected by changes in work and leisure trends. Data from this SCORP indicates that Wisconsin residents consider time to be their scarcest resource. While dual-income households

and flexible work schedules create more flexible recreation and travel patterns, the increasing demands of work often prevent people from participating in recreation as often as they would like. Work hours are longer, leisure hours less. Dual-income households in particular have felt the pinch of increased work hours as many American women (over 50%) now work outside the home. With all adults in a household working, free time available for recreating diminishes significantly. Because of these increased demands on limited spare time and the fact that households are generally busier with work and home life responsibilities, discretionary activities (activities that do not require scheduling) are expected to become increasingly popular in the coming years.

Given the significant and diverse ways that demographic trends impact recreation, it is important that any projection of future recreation demand incorporate demographic data into its findings. Projections of recreational participation that are based on total population, however, do not effectively consider changing demographics. Population has a limited impact on recreation demand because recreational activities and interests vary significantly over a person's lifetime. Rather than examine total populations, it is more useful to examine the profile, size and participation rates within actual user groups to determine future recreation needs. Certain population groups representing potential service needs or demands may be divided into specific user categories called market groups. Once these market groups are defined, additional research can reveal the specific needs and demands of each group.

Health and Wellness

Outdoor recreation is a component of physical fitness and a major focus of preventative care. Activity



done as a part of outdoor recreational activities leads to a better quality of life physically, mentally, and socially. An examination of the current outdoor recreation industry reveals several trends: increased equipment sales, development of new activities, and growth in activities at both ends of the recreation spectrum. These activities include both those that are

close to home and require little gear, such as walking, and those that require a large time commitment, a more adventurous attitude, and more technical gear, such as climbing, kayaking, and backpacking. The exact role public lands, recreational facilities, and outdoor activities will have in the future of health and wellness care is

uncertain. It is undeniable that recreation can help maintain wellness. Over time, it is expected that the health benefits of recreation will become a constant feature of programming and investment in park facilities.

Environment

As the general public becomes more aware of environmental issues, concern over environmental quality is growing. Citizen expectations are also evolving with



regards to the role regional and national environmental agencies play in local recreation and planning. More citizens are seeking an active role for themselves in environmental protection and conservation, a role that is cre-

ating a community-wide revitalization in environmental preservation and the provision of open space. This increased interest in the environment has also affected recreation participation rates as more people visit areas of minimally altered environments and trails.

Although environmental awareness is growing, environmental degradation continues. Global warming has begun to impact outdoor recreation, creating longer warm seasons, shorter cold seasons, and unpredictable climatic conditions. In the future, these changes will create an extended season for warm weather activities and a shortened season for cold weather activities. Changes to the landscape resulting from less dependable weather patterns will make seasonal recreation less reliable and planning for this type of recreation more difficult.

Technology

Electronic communication innovations have created interactive opportunities for recreation through the Internet, computer simulated games and sports, and other electronic sources. Although this new technology has increased and diversified the overall pool of recreational opportunities for users to choose from, it has also detracted from participation in more traditional recreation activities. In order to compete with non-traditional activities, providers of outdoor recre-



ation must continue to provide and maintain high quality service in all their recreational programming and facilities.

Economics

Increasingly, there is a rift between those that have access to recreation and those that do not. While house-

hold income is increasing, individual income in real growth terms is expected to decline. The fact that most homes are now two-income households results in two primary challenges. For affluent households with more discretionary income, additional resources from dual-incomes are often used for leisure

activities including travel and entertainment. This affluent population has a greater ability to participate in a broader spectrum of recreation. At the same time, however, there has been an increase in the percentage of the population that falls within poverty guidelines. This growing gap between the rich and the poor has prompted an interest in developing separate strategies for the provision of leisure services for these two populations.

This disparity in income levels has created new demands for outdoor recreation as affluent families seek out new and exciting forms of recreation and less affluent families seek out high-quality, low-cost forms of recreation. As recreation activities compete for household recreation dollars and available time, there has been an increased emphasis on value and diversity of choices in recreational activities. To remain competitive with other facilities and to appeal to family households, facilities such as swimming pools must now have the most modern equipment and technologies such as water slides and interactive play areas.

Government

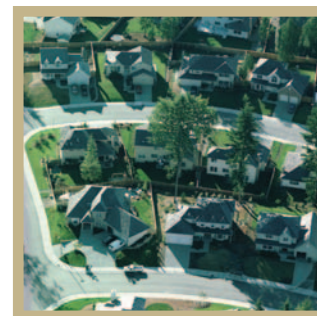
Whether state or locally owned, a large percentage of recreation lands are government owned and managed.

Pressures on government lands—greater scarcity and high cost of land, rising operating costs and revenue limits, and increasing anti-taxation sentiment—will all affect the operation and development of recreational facilities and programs on these lands. Recreation is also becoming more market driven, meaning that activities are increas-

ingly subject to competition between private, public, and non-profit recreation providers. A broad issue of what constitutes public access to public sponsored facilities and programs may challenge the financial feasibility of building new facilities and maintaining existing ones. Subsidized programs and minimal use fees could be difficult to maintain in light of these conditions.

Changing Land Use

Over time, Wisconsin's population has shifted from a predominantly rural population to a predominantly urban population. Today, roughly two-thirds of the state's population lives in urban areas, with more people migrating to these areas every year. Because of this shift, urban fringe areas are becoming an increasing hotbed for recreation activities. Facilities and spaces such as local dog parks, urban trails, and green space allocations, are all reflections of this increasing urban/suburban demand. Residential development in rural areas has continued as better highway networks provide for easy access to urban services and workplaces. Regional land use planning will continue to be a primary component in the provision of recreational activities within an ever-changing suburban environment.



Wisconsin Trends and Observations

Wisconsin's population grew 7.3% between 1994 and 2004 and is expected to grow another 3.3% by 2010. This growth, along with the state's sizeable population of baby boomers now reaching retirement age, will create a larger demand for passive recreational activities. As Table 6-1 indicates, land resource-based activities have increased just over 27% in a ten year period. Much of this increase has occurred in the areas of wildlife viewing and off-road driving, both relatively inactive activities. While not generally popular among older participants, the biggest change in recreation participation has been in the area of snow- and ice-based activities. Much of this change may be attributed to recent advancements in equipment technology and an increased interest in snowboarding and ice skating.

Table 6-2 lists the activities with the highest percentage of participation change between 1995 and 2004. Overall, kayaking experienced the highest percentage change, growing 413.7%. Horseback riding also gained in popularity, participation rising 199.35%, and the use of personal water craft such as Jet Skis grew 196.3%. Activities with the highest growth rates over this period are generally those which are considered risky or adven-



The biggest change in recreation participation has been in snow- and ice-based activities.

ture-type activities. Part of this growth is due to technological innovations such as lighter equipment, improved protective clothing, and navigation tools like GPS devices. Growth in specialized teaching programs has also advanced the popularity of these activities, many of which were once seen as elitist or requiring of advanced skills. With facilities and specialists now found across all regions of the state, these activities have become accessible to anyone with an interest.

Table 6-1: Wisconsin Participation Trends by Resource Type • 1994–2004

Resource Type	Number of Participants in Millions		Percent Change 1994-2004***
	1994*	2004**	
Snow- and ice-based activities	1.29	1.84	43.1
Land resource-based activities	3.15	4.02	27.3
Water resource-based activities	2.77	2.98	7.8

*1994 population = 5,133,678; ** 2004 population = 5,509,026; *** % growth = 7.3%

Table 6-2: Wisconsin Participation Trends by Activity • 1994–2004

Activity	Number of Participants in Millions*		Percent Change 1994-2004
	1994	2004	
Kayaking	0.051	0.262	413.7
Horseback riding	0.136	0.407	199.3
Personal water craft use	0.136	0.403	196.3
Snowboarding	0.074	0.195	163.5
Rock climbing	0.097	0.245	152.6
Soccer outdoors	0.175	0.407	132.6
Driving off-road	0.513	1.073	109.2
Orienteering	0.054	0.112	107.4

*Data from NRSE

Recreation projections can be examined in two ways. The first is simply participation as a numerical total. For the vast majority of recreation activities, this number will increase as the state's population does. To gauge a more accurate view of future participation, it is far more useful to examine a given activity's participation rate as a percentage of the total population. This number gives a better understanding of population growth vs. participation change in an activity. Table 6-3 considers the percentage changes in recreation participation rates, as well as industry forecasts and opinions from recreation professionals, to suggest which activities will be popular in the future. These observations are made for a five year period, and therefore reflect the most pressing demands on recreation in the immediate future. Some of these activities such as ATVing, RV camping, and geocaching are expected to grow in popularity. Other activities such as swimming, day hiking, and fishing, are expected to remain stable in their popularity. Still others such as downhill skiing and mountain biking are expected to decrease in popularity.



Kayaking experienced the highest percentage change in participation from 1994 to 2004, growing 413.7%.

Table 6-3: **Projected Trends in Wisconsin Outdoor Recreation Activities • 2005–2010**

Increasing Demand

Activity	Comment
ATV	Market saturation may occur by 2010, causing this use to level off.
Birdwatching	A popular activity for an aging baby boom population.
Canoeing	Cheap, easy water access for all generations.
Driving for Pleasure	An easy activity for all generations.
Gardening	On the rise with the baby boom population.
Geocaching	Popular both with families and members of the Y Generation.
Kayaking	Better technology has made this an affordable sport for the general public.
Motorboating	Costs have decreased enough to continue to make this a popular activity.
Off-road Motorcycling	Record sales of off-road vehicles continues to fuel this demand.
Paintball Games	Better and cheaper technology attracts the Y Generation.
Picnic	A family activity crossing generation gaps.
Road Biking	Increases will slow due to the retirement of Lance Armstrong and the effect that was felt from his Tour de France wins.
RV Camping	The baby boom population continues to change from tent to RVs, but increasing fuel prices may slow this.
Skateboarding	Popular with urban youth and the Y Generation.
Snowboarding	This may start to level off by 2010 as the next generation looks towards newer technology.
Snowshoeing	Not growing as fast since 2002.
Visit a Dog Park	Urban residents continue to demand more of these areas.
Walking	Popular among all ages, though especially aging baby boomers.
Water Parks	Construction of new water parks continues to fuel the increasing demand for this activity.
Wildlife Viewing/Photography	Often done in conjunction with driving for pleasure, making this activity very popular.

Stable Element

Activity	Comment
Cross-Country Skiing	Stable at this time but mainly driven by baby boomers. Declines may start by 2010.
Day Hiking	An easy, popular activity for all generations.
Disc Golf	Popular with younger urban generations.
Fishing	Very popular with all generations.
Horseback Riding	Continues to be popular with baby boomers, but may not be popular with the Y Generation.
Ice Skating	An easy, cheap activity for the mass public.
Inline Skating	After a quick rise in the 1990s this activity has leveled.
Personal Watercraft	Market saturation occurred in the 1990s with this use leveling off.
Rock Climbing	A small but stable Y Generation niche.
Rowing	A small niche activity with simple equipment.
Run/Jog	The baby boomer generation continues to run/jog, but Y Generation may not.
Sailing	Equipment demands and skill requirements prevent this from growing.
Scuba/Snorkel	A niche sport that attracts a younger generation.
Swimming	Always popular – water quality issues have caused growth in this activity to stagnate.
Tennis	A recent resurgence has stabilized this activity.
Tent Camping	Still popular but may start to lose ground to the RV trend.

Decreasing Demand

Activity	Comment
Backpacking	A popular baby boomer activity not as popular with the Y Generation.
Downhill Skiing	Continues to struggle with attracting the Y Generation.
Golf	Time and expense continue to push players to other recreation.
Hunting	Continues to struggle with generational loss and access issues.
Mountain Biking	Baby boomers that made the sport popular in the 1990s have switched to road bikes.
Snowmobile	The industry struggles with how to attract more people with less snow.
Team Sports	Except for soccer, all other sports have declined.



ATVing, RV camping, and geocaching are expected to grow in popularity.

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Chapter 6: Wisconsin Outdoor Recreation Participation Trends and Observations

The 2005–2010 Wisconsin Statewide Comprehensive Outdoor Recreation Plan

SCORP